

HOW TO... Index Word documents

An index makes reports, training materials and manuals easier to navigate, and is simple to make in Word. Rod Lawton adds a professional touch to your documents

A contents page is all very well for outlining the main points of interest in a document. However, if the document is a manual, a textbook or some other kind of reference material, you're more likely to head straight for the index.

Most publishers don't bother with an index unless the book runs to 100 pages or more. But that needn't stop you indexing shorter documents. Even if your document has only a dozen pages, it can still save your readers time, especially if the information content is very dense. Indexing is easy to do in Word. Once your key terms are indexed, it's simple to update the index to allow for edits or repagination.

Our example is based around the text for a previous Excel tutorial, but the tools and techniques can be used on your own files.

1 First, you need to go through your document looking for words and phrases that should be in the index. Obviously, you don't want to index every single 'and' or 'but', or even basic technical terms that the readers will know already. Stick to terms that are being introduced for the first time or might need some elaboration. For example, in our Excel article we use the term 'database'. Highlight the word or term you want to index. Press the Shift, Alt and X keys simultaneously. This opens the Mark Index Entry dialog box.

2 The word we've just selected is displayed in the Main entry box. You can also create nested indices using the Sub-entry box below, but to keep things simple we're sticking

with main entries for this tutorial. Below this, under Options, you can choose Cross-reference, Current page or Page range. Select Cross-reference to refer the reader to another term in the index. Opt for Current page (the default) to record the number of the page on which the term is located. Choose Page range for an explanation that spans two or more pages. In our example, we've used the Current page option.

3 There's a good chance the term you're indexing turns up more than once in your document, and you'll want the index to refer to each instance. To do this, click the Mark All button at the bottom of the dialog box. This simply adds the current instance to the index. Don't bother closing the dialog box after each item. Instead, leave it open, select the next term you want to add – for example, we're adding the term 'filtered' – and click on the dialog box to reactivate it. The new term will appear in the Main entry box ready for adding.

4 Indexing your document switches on the display of invisible characters such as carriage returns, spaces and tabs. You will also see how every word or phrase you've indexed is followed by an { XE xxxx } code. The curly brackets and the XE indicate an index entry and the xxxx corresponds to the term you've indexed (such as 'database'). You can edit the xxxx part of these codes later to change the term which appears in the index – for

example, changing a lowercase 's' in an index entry for 'sort' to an upper-case 'S' for 'Sort' (it's conventional to use upper-case initials in an index). Alternatively, get into the habit of checking the term in the Mark Index Entry dialog and amending it as necessary before it's saved.

5 Once you've gone through your document, marking up all the words and phrases you want in the index, place the insertion point at the end of the document. You might want to insert a Page Break here (Insert, Break, Page Break) so your index appears on a page of its own. Then go to the Insert menu and select Reference, Index and Tables. The Index and Tables dialog opens with the Index at the front. If you want the page numbers on the right of the page with dot 'leaders', select the Right align page numbers box.

6 Your index is now generated automatically. If you click within the index, the whole index is highlighted. The index is actually a field – that is, content that Word generates automatically. If you need to change the page setup so your document prints on A5 paper rather than A4, for example, the page numbers in the index will be wrong as they don't update automatically. Just right-click on the index and choose Update Field from the short-cut menu. The same applies if you insert or delete text or reformat it so the text moves from one page to another. **CS**

DID YOU KNOW?
To change the default index fonts and styles, choose Insert, Reference, Index and Tables. On the Index tab, select Formats, From template. Click on Modify, select an index level, then click on Modify again.

